

REPORT OF THE STANDING COMMITTEE ON SITE VISIT PROCESS AND TRAINING

Background: At its August 2020 meeting, the Commission on Dental Accreditation (CODA) considered ongoing operations in response to the COVID-19 pandemic and the impact on site visits. The Commission also directed the appointment of an Ad Hoc Committee to study virtual site visits, including development of policies and procedures for the conduct of virtual visits, for consideration by the Commission in Winter 2021. The Ad Hoc Committee on Alternative Site Visit Methods met from Fall 2021 through Summer 2023 related to alternative site visit methods required in response to the COVID-19 pandemic. In Summer 2023, the Ad Hoc Committee noted that a change to CODA's current site visit process was not warranted. However, the Committee believed CODA should continue to monitor the Department of Education's regulations related to site visit processes permitted for use by recognized accrediting agencies. The Committee also believed the ongoing review of CODA's site visit process, including feedback from programs and site visitors through CODA's Post Site Visit Survey and the ongoing training of site visitors, aligns with CODA's strategic plan for continuous quality improvement of the Commission. While no changes were warranted to the site visit process at that time, the Ad Hoc Committee believed that the Commission should transition the Ad Hoc Committee to the "Standing Committee on Site Visit Process and Training." At its Summer 2023 meeting, the Commission concurred with the recommendations of the Ad Hoc Committee and directed formation of the Standing Committee on Site Visit Process and Training, with the following Charge.

Standing Committee on Site Visit Process and Training:

- Monitor trends and USDE regulations related to CODA's site visit process;
- Evaluate site visit feedback from site visitors and programs;
- Review and develop protocols and materials to enhance the site visit process;
- Oversee and provide input on training for new and reappointed site visitors;
- Oversee and provide input on training for programs preparing for site visits; and
- Oversee and provide input to educate new program directors on working with the Commission.

Report of the Standing Committee: The Standing Committee on Site Visit Process and Training met on Wednesday, June 12, 2024. **Committee Members:** Dr. Frank Licari (chair), Dr. Victor Badner, Ms. Margaret Bowman-Pensel, Dr. Ngoc Chu, Dr. Paul Luepke, Dr. Monica Nenad, and Dr. Miriam Robbins were in attendance. Dr. Deborah Weisfuse was unable to attend the meeting. **Commissioner:** Dr. Frank Licari, committee chair, and vice chair, Commission on Dental Accreditation (CODA) was in attendance. **Commission Staff:** Dr. Sherin Tooks, senior director, and Ms. Jamie Asher Hernandez, Ms. Katie Navickas, Dr. Yesenia Ruiz, Ms. Peggy Soeldner, and Ms. Kelly Stapleton, managers, CODA were in attendance.

Training and Enhancements: The Standing Committee began its discussion with a review of its Charge. The Committee discussed the numerous training programs and process enhancements completed from January through June 2024 (**Appendix 1**) as well as potential future training

programs and process enhancements (**Appendix 2**). The Committee also discussed the requirements for site visitors to remain active, including completion of an annual mandatory quiz, and attendance at a site visitor training or update session, or review of training slides, noting the difficulty in retaining site visitors when the annual requirements are perceived as burdensome. Nonetheless, the Standing Committee believed that mandatory annual refresher training is important to ensure continued quality and improvement of site visitor performance and calibration of site visit teams.

The Standing Committee also noted the Commission's need for a Learning Management System (LMS) to facilitate ongoing site visitor training, including didactic content, video content, and quizzes, along with a tracking system to retain training completion data on site visitors. The Committee felt it would be helpful to create a short, required refresher course for all site visitors that must be completed through the LMS prior to serving on site visits. The Committee also noted that other social media channels, such as YouTube, may be an option to disseminate information to site visitors. The Standing Committee believed that CODA staff should investigate options for a LMS, either through the Electronic Accreditation System CODA is developing or through an alternate software solution.

Site Visit Feedback: The Standing Committee reviewed redacted Post Site Visit Survey data from September 2023 through March 2024, from both programs that were site visited and site visitors conducting the visits. The Committee noted that a majority of site visits appeared to go very well. A very small percentage (approximately 5-10%) of the feedback focused on issues related to topics including: questions on what meets a requirement and who decides; the timing of on-site documentation; the length of site visits (application visits, allied visits, and comprehensive dental school visits); and the flexibility of the Standards which can cause a variance in interpretation among site visitors. Following discussion, the Standing Committee believed that summary data related to common themes identified by CODA staff may be beneficial for future meetings. Additionally, the Standing Committee believed that a mandatory Site Visit Chair calibration and training is important for all disciplines under the Commission's purview. The training could provide scenarios for Chairs to manage, and best practices for calibration of site visit teams. The Standing Committee believed that a survey to all site visitors asking for scenarios and questions that have arisen would help further define the training program. Additionally, it was believed that predoctoral dental education site visit chairs would serve as an appropriate first group to calibrate through a Site Visit Chair Training Program. Following the first training, the Commission could train all allied dental and advanced dental education chairs, by discipline.

Electronic Accreditation System: The Standing Committee also discussed the Commission's ongoing urgent need for an electronic accreditation system. The Committee noted that CODA staff are working with a vendor to develop the tool. The Committee requested that CODA staff inquire about the system's ability to: impose word number limits; serve as a LMS system; provide metrics on individual site visitor performance and consistency (calibration) with CODA requirements; flag potential non-compliance issues to focus site visit teams; and interface with Artificial Intelligence (AI) tools.

Following discussion, the Standing Committee believed that the Commission should proceed with the following recommendations:

- Investigate potential Learning Management Systems;
- Survey site visitors to obtain scenarios and questions for a chair training program;
- Organize and deliver a mandatory chair training for predoctoral dental education chairs; and
- Investigate the capabilities of the Electronic Accreditation System.

Recommendations: It is recommended that the Commission on Dental Accreditation direct CODA staff to investigate potential Learning Management Systems, with a report of findings for the Winter 2025 Commission meeting.

It is further recommended that the Commission on Dental Accreditation direct CODA staff to survey active site visitors related to themes occurring on site visits, and conduct mandatory site visit chair training, beginning with predoctoral dental site visit chairs, and subsequently all other discipline-specific site visit chairs, with updates on progress through reports to the Standing Committee on Site Visit Process and Training and the Commission.

It is further recommended that the Commission on Dental Accreditation direct CODA staff to investigate the capabilities of the Electronic Accreditation System, with a report of findings for the Winter 2025 Commission meeting.

Commission Action:

Training Provided and Enhancements to Process (January – June 2024)

Training/Information for Programs:

- Program Director 101
 - March 9, 2024 (at ADEA meeting) – about 20 people
 - April 11, 2024 (virtual) – 305 people
- Q&A Session – March 10, 2024 (at ADEA meeting) – about 120 people
- Site Visit Orientation – April 8, 2024 (virtual)
 - Predoctoral – 75 people
 - Advanced – 113 people
 - Allied – 155 people
- Allied Dental Program Directors CODA Update (at ADEA Allied Director’s Meeting) – about 100 people

Training/Information for Site Visitors:

- Site Visitor Update – April 15, 2024 (virtual)
 - Predoctoral – 70 people
 - Advanced – 71 people
 - Allied – 82 people
- Chair Training
 - Advanced – May 16, 2024 – 15 people
 - Allied – May 25, 2024 – 6 confirmed and 5 more to RSVP
- Site Visitor Training (New Site Visitors, Returning, and Invited Review Committee and Commission Members) – June 13-14, 2024

Enhancements to Site Visit Process (Protocols and Materials):

- Reviewed and Updated Site Visit Letters to Programs
 - Letter 2, 3, IA Developing – Allied and Advanced
 - Letter 3 – Predoctoral
 - Special Focused Site Visit and PACV Letters
- Updated/Enhanced Educational Activity Site Form
 - To align with data reported in site visit report.

Enhancements to Guidelines and Documents Programs (Protocols and Materials):

- All Guidelines (To reflect New Verification Info)
- Completely Revised PACV Post-Observation Individual Consultation Materials and Presentation

**Future Training and Enhancements to Process
(To be conducted and/or developed; Blue could be priority)**

Training/Information for Programs:

- Program Director 101
 - Fall 2024
- Q&A Session – Fall 2024
- Site Visit Orientation – Fall 2024
 - Predoctoral
 - Advanced
 - Allied
- Create Micro-Videos on Reporting Changes and Other Topics

Training/Information for Site Visitors:

- Site Visitor Update – Fall 2024
 - Predoctoral
 - Advanced
 - Allied
- Chair Training
 - Predoctoral – Fall 2024
 - Advanced – As Needed
 - Allied – As Needed
- Site Visitor Training (New Site Visitors, Returning, and Invited Review Committee and Commission Members) – Fall 2024
- Create Post-Training Survey for Each Session
- How to Review a Program Application for Accreditation

Enhancements to Site Visit Process (Protocols and Materials):

- Continue to Review Site Visit Letters and attachments to clarify, streamline and enhance pre-site visit communications.
- Develop Site Visitor Manual, with sections for Predoctoral, Advanced and Allied.

Enhancements to Guidelines and Documents Programs (Protocols and Materials):

- Develop Process Charts for Programs to Report Changes (See most recent PD 101) and Modify Guidelines to Create Working Table Format for Submission
- Review Site Visit Schedules; increase length of IA visit (predoc)